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ABSTRACT

This discussion of personal experiences and training during a cataloger's first year begins by discussing four primary objectives in training for the cataloging of original monographs: (1) searching for suitable cataloging records using the online databases; (2) using AACR2 (Anglo American Cataloging Rules 2) standards in cataloging a monograph; (3) selecting appropriate Library of Congress classification numbers and subject headings for materials being cataloged; and (4) completing original RLIN (Research Libraries Information Network) workforms for items that have never been cataloged before or for which no suitable record exists. It is suggested that these objectives correspond very well to the stages of training a new cataloger, with each stage building on the skills learned in the previous stage. Filing in the public catalog was also learned during this first year training process. It is concluded that, although original cataloging can seem like a very difficult skill to master at the beginning of the training period, after the sequence of training steps has been completed original cataloging seems like a naturally acquired skill. (5 references) (EW)

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# TRAINING IN CATALOGING

## A REVIEW OF THE FIRST YEAR

by Barbara Spivey

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New vocabulary was tossed around with abandon, and the training manuals and documents were piled to overflowing on my desk--yes, this was my first day in training as an original cataloger of monographs at the largest research library in the state. Nevertheless, it was only a slight foreshadowing of what was to come and represented only a small percentage of every rule, practice, and technique that I would be expected to master during the next few months.

It has been said that library schools should teach theory and principle and leave the "nitty-gritty" to on-the-job training (1). I had the theoretical background. Now it was easy to see that I was about to dive head-first into the nitty-gritty.

Training of catalogers frequently follows several well-defined stages (2) and requires up to one year to complete (3). The training process at this institution followed that pattern which has been used successfully in other libraries (4), but was adapted to fit this individual library's unique situation. One particular adaptation was accelerating the training process which was necessary since the person doing the training had been granted a sabbatical. This shortened the training period from the usual one year to only eight months.

There are four primary objectives in training for original cataloging of monographs. During the training process the new cataloger should learn to be able:

1. to search for suitable cataloging records using the on-line databases.

2. to use AACR2 standards in cataloging a monograph.
3. to select appropriate LC classification numbers and LC subject headings for the material being cataloged.
4. to complete original RLIN workforms for items that have never been cataloged before or for which no suitable record exists.

These objectives correspond very closely to the stages of training a new cataloger completes as well. Each one builds on skills learned in the previous stage.

The first task to master was copy cataloging using the on-line databases. The University of Oklahoma used both RLIN and OCLC for copy cataloging, so that meant two different, although similar systems, with which to become acquainted. RLIN is used predominantly in this library so training began with that system.

Knowing how to search is the first thing to learn, since without the ability to find the correct record, there is, of course, no use for any other skills. Searching skills include both the technical skills of operating the program and selecting the best way to look for the item such as by LCCN, ISBN, title or author, and they also include the ability to pick out the best record of the ones offered. Learning to search copy cataloging records also provided valuable exposure to records of different types and of varying quality. This prompted discussions on topics that would be addressed in original cataloging such as the choice of main entry, the level of detail

necessary for the material to be properly covered, and the selection of classification numbers and subject headings. In many cases, each new bit of information about cataloging led to several more new questions.

Copy cataloging offered an introduction to the use of the fixed and variable fields of the on-line record and to their appropriate tagging. In copy cataloging some, but not all, of the fields are examined for accuracy before the record is used. Therefore, only those fields involved were learned during this stage of training.

Approximately four hours per day were devoted to time at the computer terminal during this phase of training. The remainder of the time was spent in studying the training manuals and documents to help understand more about the on-line record.

Next in learning copy cataloging was to add work on the OCLC system. Since the two systems use the same MARC tagging, the only things new to master were the different style of searching and of manipulating the program and the different style of hardware.

During this stage of training four hours per day were again spent using the terminal, but the time was split between the two systems. Also, at this point, learning the finish-up activities was begun. Finish-up entails examining the order slip to verify that it matches the information on the book, preparing the book for marking, and filing the "in process" slips in the public catalog and the shelf list catalog.

The second stage of training began with modifying records

that could not be done simply with copy cataloging. These records were for books that required a more elaborate description than the standard monograph, including books that were part of a monographic series and copies and volumes that were to be added to items already in the existing collection. These items were the ones that required more complex cataloging than was practical for the copy catalogers to prepare, since the primary purpose of copy cataloging is to catalog the material that is common to many libraries in as quick and as efficient a manner as possible.

While working on these series items and added copies (AC) and added volumes (AV), the first experience was gained in working with authority files. The series authority file certainly had to be consulted for records that listed a series, and the policy of this institution on which series to use became very important. The name authority file was used also in order to put all works by the same author together in the catalog avoiding confusion for the patron. Learning to work with the authority files meant learning to use both the ones established in this library and also the authority files of OCLC on-line and LC on microfiche.

Working on AC/AV's and the series cataloging records provided the first experience using the cataloging standards set by AACR, ISBD, and AACR2. To become proficient with these detailed and frequently ambiguous rules requires years of practice, but it was necessary at this point in the training to

master the basic ones that were used frequently. The LC Rule Interpretations were introduced at this time to help clarify some of the rules of AACR2. Although they are helpful, they do not cover every rule and every situation that can be encountered in cataloging the wide and variable range of materials that arrive in the department every day.

Another source to help in cataloging that was introduced during this stage of training were the field guides to the on-line cataloging systems. As the name implies, these books contain the guidelines for both the fixed and variable fields for the on-line record and explain which fields are required and exactly what each of their codes signify. Different field guides are used for each of the two systems, OCLC and RLIN. Also, RLIN has a holdings field guide which shows how to enumerate the library's holdings on the bibliographic record.

The third stage in training in cataloging added even more difficult and complex items to be cataloged. During this period of training books that did not have a matching record on one of the on-line systems were added to the cataloging duties. The first ones to tackle were books that had variant edition records, or records that matched in some respect but obviously were made from a different edition of the book. They included records that had a different publisher or date of publication or a different numbered edition of the same work, for example. The records were used as an example and guide for preparing an original cataloging record for input into RLIN.

Also added to the training at this time was the responsibility of assigning subject headings and classification numbers to incomplete, or base-level, records from the on-line systems. Frequently records are available that have the complete descriptive information of a book but lack subject headings and/or call numbers. This step in learning to catalog is particularly challenging since there is no absolute right or wrong way to categorize the book. It requires the ability to anticipate the thinking of the patron who will want to use that book, and put it just where he is going to look for it first. Although some items have an obvious subject matter that leads to a clear-cut choice for subject headings and call number, most do not. It is the catalogers job to determine the best location for that book.

Although most of the items held in this university are books, there are many microforms and some audiovisual materials. These items require special consideration in cataloging, classification, and marking. At this point in the training, non-book items were added to the work.

Non-book items, including microfilm, microfiche, slides, films, videocassettes, audio tapes, computer disks, and other formats, each have special requirements in cataloging. RLIN and OCLC both require specialized information for these formats. Also, the nature of cataloging can be quite different than what is done for books, because of their format. For example, the primary source of information for the catalog record is the title page and other preliminary pages of the book, but with

non-book items there is no title page. The information must be derived from the best available source.

Throughout the first three stages of training all work that was completed was also revised by the trainer before it was released. Only during the beginning of the fourth stage of training did I send work on to be input into the on-line system by the computer operator and to be labeled by the marking department without the trainer checking it also.

The fourth stage is the final one in the training process. During this stage complete original cataloging is finally possible. The previous experience can now be used to learn to do the primary work for which the position of the original cataloger was intended. Original cataloging includes providing the total bibliographic record of the material including the physical description, the classification number, and the subject headings.

Original catalog records must be produced for items that have not been cataloged before. This includes both very recently published material and a rather strange assortment of unusual items that are not held in other libraries which participate in the cooperative, on-line cataloging. It is these records that require the most time and attention to prepare properly. They will be used for not only the catalog record in this library, but may also be used by another library's copy cataloging department in the future. All fixed and variable fields in the on-line record must be completed accurately and in detail.

Other miscellaneous skills were developed during this training period that do not fit neatly into any of the four stages that have been described. Many of the items that are added to the library's collections are not in English. I have come to an understanding of the term "bibliographic knowledge" of foreign languages that was unclear before learning to catalog. It means knowing just enough to identify the title, author, publisher, series statement, broad subject matter, and so forth of many languages (5).

Filing in the public catalog was also learned during the first year training process. It was necessary to learn filing rules for several reasons. It is important to be able to find an item if it already exists in the library and to find out if a new item is an added copy or an added volume. Also, the catalogers spend time revising those who file in the public catalog.

Original cataloging seemed like a very difficult skill to master at the beginning of the training period. Yet after completing a planned, logical sequence of steps that work through all the details involved in cataloging from the very basic to the most advanced, it now seems like a naturally acquired skill.

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